

Warehouse Automation Readiness Toolkit

Your Complete Implementation Guide✪

Welcome!

Thank you for downloading the Warehouse Automation Readiness Toolkit from Conveyco. This resource is designed to turn the 9 critical steps into actionable tasks you can start today.

WHAT'S INSIDE:

- Quick-reference checklists
- ROI calculator template
- Goal-setting worksheet
- Project team framework
- One-page executive decision brief

HOW TO USE THIS TOOLKIT:

1. Print the executive decision brief for your next leadership meeting
2. Use the checklists to assign tasks and track progress
3. Complete the ROI calculator to build your business case
4. Share the project team framework to align your organization

*Disclaimer - This toolkit is provided as a general guide to assist in planning and evaluating warehouse automation initiatives. While every effort has been made to ensure the information, examples, and calculations are accurate and up to date, market conditions, pricing, technology capabilities, and operational factors can change over time. Conveyco makes no warranties or guarantees regarding the completeness, accuracy, or applicability of the content and is not liable for any decisions, actions, outcomes, or financial impacts resulting from its use. Users should independently verify all data, assumptions, and cost figures before making business or investment decisions.

STEP FOCUS AREA

TIME TO COMPLETE

PRIORITY

1. Accurate Data	2-4 weeks	HIGH
2. Strategic & Operational Goals	2-3 weeks	HIGH
3. Realistic Budget	2-4 weeks	HIGH
4. Right Software (WES)	2-3 weeks	CRITICAL
5. Aligned Project Team	1-2 weeks	HIGH
6. Change Management Plan	2-3 weeks	MEDIUM
7. Disruption Management	2-3 weeks	MEDIUM
8. Right Partner Selection	4-6 weeks	CRITICAL
9. Continuous Improvement	Ongoing	MEDIUM

Total Preparation Time: 4-6 months before RFP launch

STEP 1: Data Collection Checklist

Essential Data You Must Have:

Inventory & SKU Data

- ☐ Complete physical inventory count (95%+ accuracy)
- ☐ SKU master data (dimensions, weights, descriptions)
- ☐ Remove obsolete SKUs from system
- ☐ ABC analysis (fast/medium/slow movers)
- ☐ Current storage density calculations

Order Volume & Patterns

- ☐ 12 months of order history exported
- ☐ Average daily orders by month
- ☐ Peak season volumes documented
- ☐ Average lines per order calculated
- ☐ Most common SKU combinations identified

Throughput & Performance

- ☐ Current picks per hour by method
- ☐ Order cycle time (receipt to ship)
- ☐ Current order accuracy rate
- ☐ Peak vs. average capacity
- ☐ Error rates and root causes

Space & Layout

- ☐ Updated facility layout drawing
- ☐ Square footage by zone documented
- ☐ Ceiling heights measured
- ☐ Column spacing recorded
- ☐ Current utilization percentage calculated

Labor Metrics

- ☐ Staffing levels by shift
- ☐ Labor cost per hour (with benefits)
- ☐ Overtime patterns analyzed
- ☐ Turnover rate calculated
- ☐ Injury/workers' comp costs documented
- ☐ Onboarding - estimated time for a new associate to be at expected standard

Assign to: _____

Due Date: _____

STEP 2: Goal Setting Worksheet

Strategic Goals (Business-Level):

Our 3-5 year business vision:

Capacity needs too support growth:

- Current capacity: _____ orders/day
- Needed capacity in 3 years: _____ orders/day
- Growth rate: _____ %

Strategic Goals (check all that apply):

- ☐ Support ____% annual growth without facility expansion
- ☐ Enable same-day/next-day delivery capabilities
- ☐ Reduce dependency on seasonal labor by ____%
- ☐ Improve customer satisfaction score from ____ to ____
- ☐ Enter new markets/channels: _____
- ☐ Other: _____

Operational Goals (Metrics-Level)

Create SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound):

Throughput:

- Current: _____ orders/day
- Target: _____ orders/day (____% increase)
- Timeline: Achieve by _____

Accuracy:

- Current: _____ %
- Target: _____ %
- Timeline: Achieve by _____

Labor Productivity:

- Current: _____ picks/hour
- Target: _____ picks/hour
- Timeline: Achieve by _____

Cost per Order:

- Current: \$ _____
- Target: \$ _____ (____% reduction)
- Timeline: Achieve by _____

Safety:

- Current: _____ incidents/year
- Target: _____ incidents/year (____% reduction)
- Timeline: Achieve by _____

Approved by: _____ Date: _____

Current Annual Costs

Labor Costs:

- Picking labor: \$_____ /year
- Packing labor: \$_____ /year
- Receiving labor: \$_____ /year
- Overtime costs: \$_____ /year
- Total Labor: \$_____ /year
- Onboarding: \$_____/per FTE to get to expected standard

Error Costs:

- Current error rate: _____%
- Cost per error (returns, re-shipping): \$_____
- Annual error volume: _____
- Total Error Cost: \$_____ /year

Injury Costs:

- Annual workers' comp: \$_____
- Lost time costs: \$_____
- Total Injury Cost: \$_____ /year

Space Costs:

- Cost per square foot: \$_____
- Total square footage: _____
- Total Space Cost: \$_____ /year

TOTAL CURRENT ANNUAL COSTS: \$_____ /year

Projected Investment

Hardware: \$_____ (typically 58% of total)

Software/WES: \$_____ (growing rapidly, budget 15-20%)

Installation/Integration: \$_____ (typically 20-30% of hardware)

Training/Change Management: \$_____ (don't underestimate)

Contingency (20%): \$_____

WMS Modifications to Support Proposed Automation: \$_____

Building Costs to Support Proposed Building Modifications (ie fire protection, floor remediation, increased power & distribution): \$_____

TOTAL INITIAL INVESTMENT: \$_____

Projected Annual Benefits

Labor Savings:

- Expected reduction: _____%
- Annual savings: \$_____ /year
- Reduction of Onboarding: \$_____

Error Reduction:

- Target error rate: _____%
- Annual savings: \$_____ /year

Injury Reduction:

- Expected reduction: _____%
- Annual savings: \$_____ /year

Capacity Increase Value:

- Avoided expansion cost: \$_____ (or)
- Revenue from additional capacity: \$_____ /year

TOTAL ANNUAL BENEFITS: \$_____ /year

ROI Calculations

Annual Ongoing Costs:

- Maintenance/support (10-15%): \$_____ /year
- Software licenses: \$_____ /year
- Utilities increase or decrease: \$_____ /year
- **Total Ongoing:** \$_____ /year

Net Annual Benefit: Total Benefits - Ongoing Costs = \$_____ /year

Simple Payback Period: Initial Investment ÷ Net Annual Benefit = _____ years

Industry Benchmark: 12-18 months is typical for AMRs and modern automation

5-Year Total Benefit: \$_____ × 5 = \$_____

5-Year Net Benefit: 5-Year Total - Initial Investment - (Ongoing × 5) = \$_____

5-Year ROI: [(5-Year Net Benefit ÷ Initial Investment) × 100] = _____%

STEP 4: WES Software Evaluation Scorecard

Why WES Matters:

WES does what WCS can do and what WMS says it can but cannot. Don't skip this step.

Evaluation Criteria (Rate 1-5, then multiply by weight)

Criteria	Weight	Provider 1	Provider 2	Provider 3
Vendor-agnostic (works with any hardware)	5x	___ x 5 = ___	___ x 5 = ___	___ x 5 = ___
Real-time optimization capabilities	5x	___ x 5 = ___	___ x 5 = ___	___ x 5 = ___
Multi-system orchestration	4x	___ x 4 = ___	___ x 4 = ___	___ x 4 = ___
Scalability for future growth	4x	___ x 4 = ___	___ x 4 = ___	___ x 4 = ___
Integration with your WMS/ERP	5x	___ x 5 = ___	___ x 5 = ___	___ x 5 = ___
Analytics & reporting quality	3x	___ x 3 = ___	___ x 3 = ___	___ x 3 = ___
Customer references quality	4x	___ x 4 = ___	___ x 4 = ___	___ x 4 = ___
Implementation support	3x	___ x 3 = ___	___ x 3 = ___	___ x 3 = ___
Pricing/value	3x	___ x 3 = ___	___ x 3 = ___	___ x 3 = ___

TOTAL SCORE

Maximum possible score: 180 points

Questions to Ask WES Providers:

1. How many different automation hardware brands do you successfully orchestrate?
2. What happens if we want to add equipment from a different vendor in 3 years?
3. How quickly does your system respond to changing conditions (seconds? minutes?)?
4. Can you show us a live demo with our specific WMS?
5. What's included in ongoing support, and what costs extra?
6. Can the WES take on some of the functionality needed from the WMS, thereby reducing changes to the WMS?

Recommended: Consider Conveyco's New Dawn WES (proven, vendor-agnostic, scalable).

STEP 5: Project Team Framework

Core Team Roles (Fill in names/assignments)

Executive Sponsor

- Name: _____
- Role: Budget authority, strategic vision, removes obstacles
- Time commitment: 2-4 hours/week
- Key responsibility: Secure funding and organizational buy-in

Project Manager

- Name: _____
- Role: Timeline, budget, coordination
- Time commitment: 20-30 hours/week (dedicated resource recommended)
- Key responsibility: Keep project on track and within budget

Operations Lead

- Name: _____
- Role: Daily workflows, operational needs
- Time commitment: 10-15 hours/week
- Key responsibility: Ensure solution addresses real operational needs

IT Representative

- Name: _____
- Role: System integration, technical infrastructure
- Time commitment: 5-10 hours/week
- Key responsibility: WES/WMS/ERP integration planning

Finance Representative

- Name: _____
- Role: ROI tracking, budget management
- Time commitment: 3-5 hours/week
- Key responsibility: Business case and financial tracking

HR/Training Coordinator

- Name: _____
- Role: Change management, training programs
- Time commitment: 5-10 hours/week
- Key responsibility: Employee communication and training

Floor Supervisors (2-3 people)

- Names: _____
- Role: Ground-level insights, user adoption
- Time commitment: 5-8 hours/week each
- Key responsibility: Represent frontline concerns and drive adoption

Decision-Making Matrix

Decision Type	Who Decides	Who Must Approve	Who Must Be Consulted
Budget approval	Finance Rep	Executive Sponsor	PM, Ops Lead
Technology selection	PM, Ops Lead	Executive Sponsor	IT, Floor Supervisors
Go-live timing	PM, Ops Lead	Executive Sponsor	All team members
Design changes	PM, Ops Lead	Executive Sponsor (if budget impact)	IT, Floor Supervisors
Training approach	HR/Training	Ops Lead	Floor Supervisors

Team Meeting Cadence

Weekly Status Meetings (30 min)

- Attendees: Core team
- Purpose: Progress updates, issue resolution
- Led by: Project Manager

Finance Representative

- Name: _____
- Role: ROI tracking, budget management
- Time commitment: 3-5 hours/week
- Key responsibility: Business case and financial tracking

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Team Meeting Cadence

Weekly Status Meetings (30 min)

- Attendees: Core team
- Purpose: Progress updates, issue resolution
- Led by: Project Manager

Monthly Executive Briefings (60 min)

- Attendees: Core team + Executive Sponsor
- Purpose: Milestone review, budget status, strategic decisions
- Led by: Project Manager

Quarterly Stakeholder Updates (30 min)

- Attendees: All stakeholders organization-wide
- Purpose: Progress communication, celebrate milestones
- Led by: Executive Sponsor

STEP 6: Change Management Quick Plan

Phase 1: Discovery (Weeks 1-3)

- ☐ Conduct 3-5 focus groups with warehouse staff
- ☐ Survey all warehouse employees (anonymous)
- ☐ Interview supervisors one-on-one
- ☐ Document top 10 pain points
- ☐ Identify 3-5 potential champions
- ☐ Share findings summary with all staff

Phase 2: Communication (Ongoing)

- ☐ Draft FAQ addressing job security concerns
- ☐ Create communication calendar (weekly updates)
- ☐ Schedule "automation education" lunch-and-learns
- ☐ Make "no layoffs" commitment in writing
- ☐ Show career development opportunities automation creates
- ☐ Involve floor staff in provider site visits

Phase 3: Training (Pre Go-Live)

- ☐ Develop role-specific training curriculum
- ☐ Create video tutorials and quick-reference guides
- ☐ Identify "super users" for peer training (2-3 per shift)
- ☐ Schedule hands-on training sessions (2 weeks before go-live)
- ☐ Plan for extended support first 30 days post go-live
- ☐ Set realistic productivity ramp-up timeline

Phase 4: Feedback Loop (Post Go-Live)

- ☐ Daily huddles first 2 weeks
- ☐ Weekly feedback sessions first 3 months
- ☐ Anonymous suggestion box
- ☐ Monthly team recognition for automation successes
- ☐ Quarterly improvement review sessions

Champion: _____ Budget: \$ _____

STEP 7: Disruption Planning Template

Expected Impact Assessment

Reduced Capacity Phases:

- Phase 1: _____ (dates) - Capacity at ____%
- Phase 2: _____ (dates) - Capacity at ____%
- Phase 3: _____ (dates) - Capacity at ____%

Full/Partial Shutdowns:

- Shutdown dates: _____
- Duration: _____ days
- Areas affected: _____

Learning Curve Period:

- Expected productivity dip: ____%
 - Duration: _____ weeks
 - Return to baseline: _____ weeks post go-live
-

Contingency Plans

Customer Communication:

- ☐ Notify key customers _____ weeks in advance
- ☐ Communication drafted and approved
- ☐ Account managers briefed
- ☐ Alternative delivery options identified

Inventory Buffers:

- ☐ Build ____% additional finished goods inventory
- ☐ Start buffer build _____ weeks before disruption
- ☐ Secure additional storage: _____

Alternative Fulfillment:

- ☐ 3PL partner identified: _____
- ☐ Backup capacity: _____ orders/day
- ☐ Cost per order: \$_____
- ☐ Transition plan documented

Staffing:

- ☐ Temporary labor agency contracted: _____
- ☐ Additional _____ people budgeted
- ☐ Cross-training completed for flexibility
- ☐ Overtime pre-approved for _____ weeks

Internal Expectations:

- ☐ Executive team briefed on realistic timeline
- ☐ KPI targets adjusted for transition period
- ☐ Weekly status reports scheduled
- ☐ Risk mitigation strategies documented

Owner: _____ **Review date:** _____

STEP 8: Partner Evaluation Scorecard

Rate each provider 1-5, then multiply by weight

Criteria	Weight	Provider 1	Provider 2	Provider 3
Relevant industry experience	5x	___ x 5 = ___	___ x 5 = ___	___ x 5 = ___
Customer references quality	5x	___ x 5 = ___	___ x 5 = ___	___ x 5 = ___
Multi-technology expertise	4x	___ x 4 = ___	___ x 4 = ___	___ x 4 = ___
WES capabilities	5x	___ x 5 = ___	___ x 5 = ___	___ x 5 = ___
Partnership approach	4x	___ x 4 = ___	___ x 4 = ___	___ x 4 = ___
Post-implementation support	5x	___ x 5 = ___	___ x 5 = ___	___ x 5 = ___
Scalability & flexibility	4x	___ x 4 = ___	___ x 4 = ___	___ x 4 = ___
Realistic timeline	3x	___ x 3 = ___	___ x 3 = ___	___ x 3 = ___
Transparent pricing	3x	___ x 3 = ___	___ x 3 = ___	___ x 3 = ___
Documentation quality	2x	___ x 2 = ___	___ x 2 = ___	___ x 2 = ___
Alignment of company culture	4x	___ x 4 = ___	___ x 4 = ___	___ x 4 = ___
TOTAL SCORE		_____	_____	_____
Maximum possible score: 200 points				

Critical Questions to Ask Every Provider**Experience & Track Record:**

1. How many projects like ours (size, industry, complexity) have you completed?
2. Can we visit 2-3 reference sites and speak directly with operations managers?
3. What was your largest project failure, and what did you learn?

Technical Capabilities:

4. Walk us through how your solution integrates with our specific WMS.
5. What happens if we want to add different automation equipment in 3 years?
6. How do you handle WES orchestration? (If they say "WMS handles it" - red flag!)

Partnership & Support:

7. What does your post-implementation support include, and what costs extra?
8. How quickly do you respond to critical issues? (Get specific SLAs)
9. What's your process if the project takes longer than planned?

Pricing & Value:

10. Provide a detailed cost breakdown. What's included vs. excluded?
11. What are typical change order scenarios, and how are they priced?
12. What's the payment schedule tied to milestones?

Pricing & Value:

10. Provide a detailed cost breakdown. What's included vs. excluded?
11. What are typical change order scenarios, and how are they priced?
12. What's the payment schedule tied to milestones?

Red Flags Checklist

Watch out for providers who:

- ☐ Push a single technology without considering alternatives
- ☐ Can't provide recent, relevant customer references
- ☐ Focus only on hardware, barely mention software
- ☐ Make unrealistic timeline promises
- ☐ Pricing significantly lower than others (by 30%+)
- ☐ Unwilling to provide detailed documentation
- ☐ Vague about post-implementation support
- ☐ Pressure you to decide quickly
- ☐ Avoid discussing risks or challenges
- ☐ Vague about software functionality

If 3+ red flags: Remove from consideration

STEP 9: Continuous Improvement Tracker

Year 1 Optimization Goals

Month 3 Post Go-Live:

- ☐ Achieve ____% of projected throughput
- ☐ System uptime above ____%
- ☐ Complete all operator training
- ☐ Document top 3 improvement opportunities

Month 6 Post Go-Live:

- ☐ Achieve ____% of projected throughput
- ☐ Error rate below ____%
- ☐ Implement first round of optimizations
- ☐ Cross-train ____% of operators

Month 12 Post Go-Live:

- ☐ Achieve 100%+ of projected throughput
 - ☐ Complete ROI analysis vs. projections
 - ☐ Identify expansion opportunities
 - ☐ Plan Year 2 enhancement budget
-

Annual Review Checklist

Performance Review (Every 12 months):

- ☐ Compare actual vs. projected ROI
- ☐ Analyze system uptime and reliability
- ☐ Survey operator satisfaction
- ☐ Review all incidents and root causes
- ☐ Benchmark against industry standards

Technology Review (Every 12 months):

- ☐ Review provider's technology roadmap
- ☐ Evaluate new WES features/capabilities
- ☐ Assess opportunities for additional automation
- ☐ Plan necessary system upgrades

Partnership Review (Every 12 months):

- ☐ Evaluate provider responsiveness and support
- ☐ Review and renew SLAs
- ☐ Discuss business growth plans
- ☐ Budget for next year's optimization

Annual Optimization Budget: \$_____ (10-15% of initial investment)

Executive Decision Brief (One-Page)

[See separate one-page document for printable executive summary]

This one-pager includes:

- The 9 critical success factors
- Go/No-Go decision criteria
- Responses to common pushback
- Next step options
- Financial snapshot
- Timeline overview

Use this in your next leadership meeting to get buy-in!

Your Next Steps

Immediate Actions (This Week):

- ☐ Schedule kickoff meeting with potential project team
- ☐ Begin data collection using Step 1 checklist
- ☐ Review current budget availability
- ☐ Identify 2-3 potential automation partners to research

Short-Term Actions (Next 30 Days):

- ☐ Complete goal-setting worksheet (Step 2)
- ☐ Build initial ROI model (Step 3)
- ☐ Research WES options including New Dawn (Step 4)
- ☐ Formally assign project team roles (Step 5)

Medium-Term Actions (Next 90 Days):

- ☐ Complete data audit and validation
- ☐ Finalize budget and secure funding
- ☐ Begin partner evaluation process
- ☐ Develop change management plan



Ready to Automate?

Conveyco is here to support you at every step.

Contact Conveyco today:

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Your Partner in Warehouse Automation Success

This toolkit is designed to be practical and actionable. Print what you need, share with your team, and use it as a living document throughout your automation journey

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